
Integration Partner Integration Support & Transition Achievement Report (Deliverable 153.1.1b) January 2004

Executive Summary

Integration Partner supports FSA's leadership and the actions required to drive the development of integration projects and initiatives. This report summarizes Integration Partner's activities for the month of January that support the development of integration projects and initiatives.

Major accomplishments for the month include those accomplishments that support FSA's Business and Technology Integration Group. This support has included the following:

- Continued development of enterprise sequencing plans that focus specifically on FSA's business and technical integration initiatives and critical dependent enterprise activities,
- Continued management of enterprise integration risks, and
- Development of artifacts and presentation content in support of GAO's review of FSA's Systems Integration efforts.

In addition, the Enterprise Data Strategy Phase II task order has been awarded and initial planning activities were completed.

Enterprise gaps that may have an effect on FSA's integration program are summarized on page five. In summary, these gaps focus on the following:

- The ability of the eZ-Audit team to meet target dates as a result of re-validation and re-scoping of requirements for the eZ-Audit Release 2.0. Once the scope of the Release 2.0 effort has been finalized, FSA and Integration Partner need to work together in a timely manner to modify the task order so the scope of the work and new target dates are aligned.
- Concern that the service provider transition for EAI and ITA may disrupt current operations and development efforts. FSA, the new vendor and Integration Partner need to continue efforts to ensure a smooth transition.

Overall Value Delivered

Integration Progress

The following synopses outline progress towards major integration initiatives within the Integration Partner program, including Application & Delivery, Enterprise Data Strategy and Integrated Partner Management.

Application & Delivery

- Common Origination & Disbursement (COD) Releases 3.0 and 3.1 (2004-2005 annual cycle) will continue to build upon the existing COD solution that provides FSA with a core, single integrated solution to manage aid originations and disbursements.

- Test efforts are underway for Release 3.0; implementation is currently scheduled for a March release. Release 3.1 is currently scheduled for a July 2004 implementation; functional and technical designs are currently under development.

Enterprise Data Strategy

- The Enterprise Data Strategy Phase II task order was awarded. This task order will focus on further developing the results of the Data Strategy Phase I task order, and will include further analysis on the following areas:
 - FFEL / student data enrollment data reporting options
 - Website and portals consolidation options
 - Shared services implementation options
 - Impact of CSB procurement outcome
 - Financial transaction processing options
 - Enterprise analytics support architecture options.

The end result of this task order will be a more detailed overall enterprise-wide data framework that integrates the components listed above, as well as a functioning XML management tool and support of an active data quality management process for FSA.

- The Integration Partner team conducted initial planning efforts for the Phase II task order.

Integrated Partner Management (IPM)

- The IPM Gaps Analysis task order will seek to address any gaps or remaining aspects within the IPM framework that have yet to be identified, resulting in end-to-end business requirements for an overall IPM solution.
- The IPM Gaps Analysis team continued to develop Financial Partners Oversight and Eligibility As-Is flows and the requirements for Non-Case Management Schools. Additionally, eCMO requirements were reviewed for alignment with the target state.
- The eZ-Audit team is currently focused on Release 2.0. This release will support upcoming audits, fixes to the PEPS interface, school group fixes and other enhancements to the current eZ-Audit. FSA and Integration Partner are in the process of defining scope, requirements and design.
- The Identity and Access Management Tools Analysis task order will seek to understand how available Identity and Access Management technologies and tools can help achieve FSA business objectives. The task order will enable FSA to explore vendor products and their suitability for addressing FSA requirements.
- During the month of January, the Identity and Access Management team completed on-site information gathering meetings with vendors and provided results to FSA's Security Working Group. The team also delivered the Identity and Access Management Tools Vendor Analysis. In addition, the Integration Partner team supported FSA's briefing to the Business and Technology Integration Group.

The Integration Partner Bi-Weekly Status Reports provide detailed project-level status, as well as a Program Scorecard that reflects project variances from the previous reporting month, and is focused on

the Task Order, Scope, Schedule, Cost, Quality and Overall variances. Projects are on schedule and have no significant issues. The Enterprise Data Strategy task order must be monitored carefully to ensure there is no schedule slip as a result of the delayed award. Additionally, the scope of the eZ-Audit task order may change as a result of requirements validation and rescoping efforts. Any scope changes will have an impact on overall deliverables and total cost of project. Refer to the attached January Bi-Weekly Status Reports, Bi-Weekly Status Report 01-15-04.pdf and Bi-Weekly Status Report 01-27-04.pdf.

Participation in FSA Business Integration & Technology Group (BTIG)

The Integration Partner provides business, technical and integration support to FSA's Business Integration and Technology Group. Integration Partner provides this group with the following:

- Vision analysis, facilitation and establishment,
- Coordination and alignment of the Integration Partner program with overall program vision,
- Agenda management and meeting coordination,
- Management of the enterprise sequencing plans, and
- Facilitation of major integration dependencies, risks and issues.

Accomplishments for the month of January have included participation in key integration discussions, continued management of integration risks and enterprise sequencing plans for FSA's various integration projects and initiatives and general BTIG administration. Additionally, Integration Partner has provided support in preparation for GAO's review of FSA's Systems Integration efforts. Integration Partner provided artifacts and presentation content for the Systems Integration kickoff briefing to GAO.

Key integration discussions and decisions resulting from the weekly BTIG meetings for the month of January included:

- Access Management Tools Analysis Overview (*presented by FSA's Bob Ingwalson and Integration Partner's Jesse Bowen*)
 - The Tools Analysis project was reviewed; this project follows the initial Data Strategy Access and Enrollment efforts. Major phases and tasks of this task order include:
 - Vendor analysis phase to support FSA short list selection
 - Product options phase to analyze vendor solution fit with FSA business objectives and assist with prototype component identification
 - Prototype phase to deploy and analyze an Identity and Access Management prototype in the FSA development environment
 - Major security, privacy, enrollment and access business objectives were reviewed.
 - Security Architecture Working Group objectives were reviewed. The BTIG provided input to the working group outcomes and participants.
 - The vendor analysis status was provided. Criteria categories for tool selection and initial vendor meetings to date were reviewed.
- Oracle 11i Upgrade (*presented by FSA's Jay Hurt*)

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- The Oracle 11i implementation approach was reviewed.
 - FSA is currently focused on pre-implementation activities (through March 31, 2004).
 - The implementation approach is comprised of four phases leading to a go-live date of 10/06:
 - OCFO and FSA impact assessment (completed)
 - Upgrade strategy and approach (04/01/04-09/30/04)
 - Detailed implementation planning (10/01/04-10/31/04)
 - Implementation (11/1/2004-06/30/2006)
 - The related procurements were reviewed, to include OCFO program management, IV&V, the integrator and FSA support.
 - It was proposed that COD and 11i requirements gathering be conducted together in the April/May timeframe.

The BTIG discussions for the month of February will be limited, as the meeting time will be utilized for FSA resources to continue to discuss market research. Integration Partner will participate in the following scheduled FSA BTIG discussions for the month of February:

- 2/17: BTIG Roles and Responsibilities
- 2/19: Shared Services
- 2/24: Common Services for Borrowers, Data Strategy II
- 2/26: Front End Business Integration, Integrated Partner Management

Additionally, Integration Partner will continue to support FSA's BTIG during GAO's Systems Integration review, as well as manage enterprise risks and sequencing plans.

Enterprise Risk Management

FSA's BIG continues to identify integration risks among the key integration initiatives. Risks were reviewed and updated during the month of January; however, the risks and associated mitigation plans are still being validated among the business owners. Integration risks will continue to be identified, monitored and escalated to Management Council as needed.

Additionally, Integration Partner project-level risks can be found in the Bi-Weekly Status Reports for the month of January. Refer to the attached January Bi-Weekly Status Reports, Bi-Weekly Status Report 01-15-04.pdf and Bi-Weekly Status Report 01-27-04.pdf.

Enterprise Sequencing Plan

Sequencing plans for key integration initiatives must be managed at the program level. Integration Partner maintains the program schedule, the Integrated Master Schedule, which tracks Integration Partner task order start and end dates, major milestones and future projects. Refer to the attached document, Mod Integrated Master Schedule_012704v3.pdf, for the current Integration Master Schedule.

Integration Partner also maintains FSA's Integrated FSA Sequencing Plan views, which help to inform planning of investment initiatives by providing a consolidated view of constraints and an integrated view of timelines and dependencies across major integration initiatives. During the month of January, Integration Partner and the BIG continued to develop an enterprise sequencing plan focused

specifically on FSA's key business and technical integration initiatives and critical dependent enterprise activities. Refer to the attached document, FSA BIG Sequencing Plan Integration DRAFT 02042004 v4.xls, for the current enterprise sequencing plan.

Enterprise Gaps

The following synopses summarize any enterprise gaps that may have an effect on FSA's integration program.

- Integration Partner is currently working with FSA to validate and re-scope requirements for the eZ-Audit Release 2.0. As a result of this effort, target dates in the current task order will be impacted. Once the scope of the Release 2.0 effort has been finalized, FSA and Integration Partner need to work together in a timely manner to modify the task order so the scope of the work and new target dates are aligned.
- There is concern that the service provider transition for EAI and ITA may disrupt current operations and development efforts. Specifically, there may be impacts to COD processing and new development as a result of any disruptions, increased customer service call volume and related resource constraints. In addition, the prototype associated with the Identity and Access Management Tools will be installed in the ITA environment at the VDC. The task order schedule could be impacted if appropriate service levels or environment availability is not provided. FSA, the new vendor and Integration Partner need to continue efforts to ensure a smooth transition.

Integration Partner Internal Integration

Integration Partner ensures that key integration projects and initiatives are integrated throughout the program by providing a formal venue for integration leads to meet and share knowledge as it relates to project status, impacts, dependencies and deliverables. As a result of recent task order awards for key integration projects, Integration Partner has realigned its internal integration efforts.

Integration Efforts Planned for February 2004

The Integration Partner will focus on further developing the following integration areas: Application & Delivery, Data Strategy and Integrated Partner Management.

Application & Delivery

- COD will continue to move forward with development activities for Releases 3.0 and 3.1.

Enterprise Data Strategy

- The team kickoff with FSA will be conducted in early February. In addition, the teams will conduct initial working sessions with FSA subject matter experts.
- The team will begin to draft Functional Gap Analysis and Enterprise Analytics Architecture Options Analysis deliverables.
- The Data Strategy team will provide support to FSA for the Data Strategy briefing to the BTIG.

Integrated Partner Management

- The IPM Gaps Analysis team will continue to develop Financial Partners Oversight and Eligibility As-Is flows and the requirements for Non-Case Management Schools. Draft deliverables will be submitted to FSA for review.
- The IPM Gaps Analysis team will provide support to FSA for the IPM briefing to the BTIG.
- Integration Partner will continue to work with FSA to finalize scope and requirements for Release 2.0 of the eZ-Audit solution.
- The Identity and Access Management team will be organizing product demonstrations for FSA's Security Working Group. Additionally, the team will begin preparations for the Product Testing phase.

Integration & Transition Support

- The Integration Partner team will continue to support the efforts of FSA's BTIG, to include management of enterprise risks and sequencing plans, coordination of weekly BTIG meetings and assistance as needed with the GAO Systems Integration review.
- The Integration Partner team will participate in the February BTIG meeting discussions.
- Integration Partner will begin supporting FSA in their efforts to re-compete an Integrator as part of the Task Order 153 Due Diligence activities. In addition, resources from key integration initiatives will also be providing support.

The Integration Partner Bi-Weekly Status Reports provide detailed project-level status for the upcoming weeks. Refer to the attached January Bi-Weekly Status Reports, Bi-Weekly Status Report 01-15-04.pdf and Bi-Weekly Status Report 01-27-04.pdf.